

1. About This Manual

This manual explains how to use Inte-Great Property Manager (IPM). Throughout the text the software will be referred to as either Inte-Great Property Manager or IPM. Before first entering data, we recommend that you spend some time familiarizing yourself with IPM by browsing each of the sections that follow.

2. Read Me First

2.1. What You Should Do First

- **Record Important Information about Inte-Great Property Manager below.**
The information will be readily available if you ever need it.

Serial Number:	_____
User Count:	_____
Record Count:	_____
My User ID:	_____
My Password:	_____

- Make sure your system meets the Minimum Configuration requirements listed in Chapter 1, Introduction.
- Install the IPM software, following the simple instructions on the card included with the CD-ROM.

3.1. About Inte-Great Property Manager

IPM for Windows is a complete, easy-to-use asset management and reporting tool that provides a cost-effective solution to the complex task of managing office equipment and personal property. IPM offers a variety of functions that provide fast, exact accounting of your personal property, office equipment, furniture, complex technical and computer equipment, vehicles, or any items that need to be monitored.

- IPM organizes information about asset ownership and assignment within your company, department and organization.
- IPM records detailed asset information--type, manufacturer, model and serial number, purchase order, date received, and more.
- IPM tracks costs, installed components, service history, depreciation, current value, and ownership history of each asset
- IPM provides pre-designed reports showing up-to-the minute status of your fixed assets. It also allows the user to design customized reports to satisfy specific needs.
- IPM can be used to conduct complete audits of entire buildings in a fraction of the time required by paper audits. A portable barcode scanner allows you to gather and upload scanned data, automatically update your IPM database, and identify missing, misplaced, or improperly recorded assets.
- With the optional Data Collection Module, you can capture various unique identifying information when assets are first received, assign a barcode number, and upload the newly-acquired asset to the IPM database, thus widening the span of accountability.

3.2. Minimum System Configuration

Hardware

- Pentium 133 microprocessor
- 16 Mb of available RAM
- 20 Mb of available disk space
- VGA color monitor
- HP LaserJet printer or compatible.

Operating System

- Windows 95/98/NT

Network Compatibility

- Windows NT
- NetWare 3.x or Higher
- Banyan Vines

3.3. Installation

IPM installation instructions are found on a card included with the CD-ROM

4.1. Before You Begin

A word about Lookup Tables

Lookup tables are the building blocks of your property database. They help you enter data more quickly and efficiently.

What are the advantages?

1. Lookup Tables fill in fields of the Main Inventory Screen.
2. Data is consistent throughout the property system--IBM is always IBM, not I.B.M. or International Business Machines, or some other abbreviation.
3. Changing a Lookup Table entry automatically updates all the assets where that entry occurs. This is particularly valuable in keeping your records current with a minimum of effort.

For optimum value to users, keep your Lookup Tables up to date, if not daily then at least weekly. System Administrators may decide to mandate the use of Lookup Tables to ensure the creation and maintenance of the most accurate database.

Lookup Tables have an additional value: they speed up data entry. For example, when you use the Employee Lookup Table to assign an asset to a particular person, you not only fill in the Name field. IPM also fills in the employee's Room Number, Telephone Number, Department, Organization, and ID Number. Several other Lookup Tables also complete more than one field.

4.2. Basic Definitions

As you progress through this Manual, here are four definitions to keep in mind:

- Asset - an item of accountable property
- Component - an item that is contained inside of, or is wholly subordinate to, another item and adds to its value, but is not bar coded or audited.
- Inventory - the listing of all your assets
- Audit - the periodic physical count of your inventory

4.3. Developing an Inventory Plan

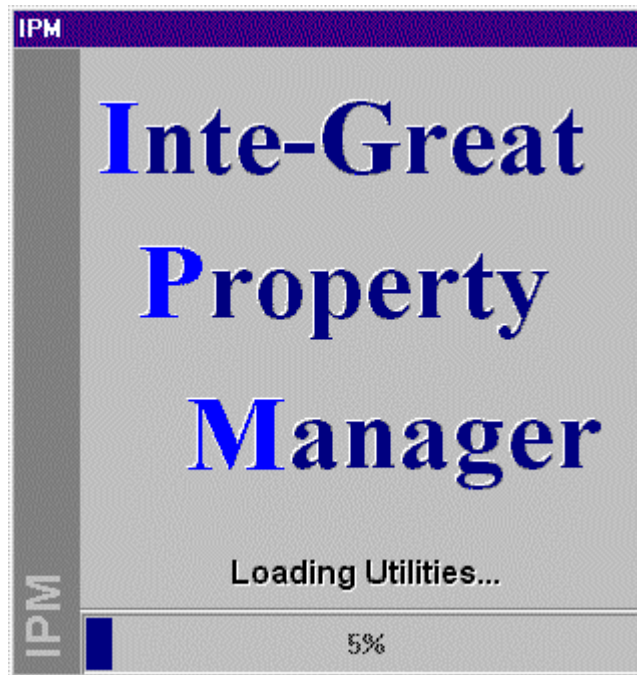
To derive the full benefit from IPM, we recommend developing an inventory management plan for tracking your assets. If this already exists in your organization, it may require some revision to accommodate the introduction of IPM. If not, here are some considerations to keep in mind when developing a plan.

- An Inventory Plan may be considered a policy decision. Will it require approval by higher-level management?
- Which items will be entered as assets? Which items will be treated as components?
- Will you use the IPM Data Collection Module (DCM)?
- When will you enter your data into IPM? Upon receipt, when the bar code is applied? When the asset is assigned to a Property Administrator (the accountable officer)? When assigned to the employee using the asset? On a scheduled (daily, weekly) basis?
- Who will be the Property Administrators, who are responsible for managing their assigned assets and associated IPM records?
- Who will be allowed to read IPM records? To enter new records? To edit existing records? To delete records?
- Will Lookup Tables be an integral part of your IPM procedures?

For maximum control, we recommend entering new assets as they are received, or at least on a daily basis. New employees or changes of employee location might be entered weekly. Reassignment of assets from one employee to another is best done promptly, workload permitting.

5. Entering IPM

To enter IPM, click on the icon in the Program Manager window. The “Welcome to IPM” screen includes a box showing the progress of the loading process, up to 100%.



After loading IPM, you will probably be prompted to enter your User name and your password.



5.1. Troubleshooting Suggestions

If you are having difficulties loading IPM, here are a number of things to check:

- How much total memory does your computer have? To run most efficiently, IPM requires at least 8 megs of total memory. While you should be able to run IPM with 4 megs of total memory, the performance of the system will probably be very slow. So, make sure you have 8 megs of total memory. If you do not, we suggest you seriously consider increasing the amount of memory.
- Are you running any other programs in Windows? If you are having problems loading IPM, make sure you close all other programs in Windows, and then attempt to run IPM. If you are able to run IPM if every other application is closed, we would recommend you purchase more memory and install it in your PC.
- Make sure you have enough file handles in CONFIG.SYS.
- On your C: drive, look for a file called CONFIG.SYS. Open this file with an ASCII text editor. preferably the one that comes with your operating system: EDIT.COM. To open the CONFIG.SYS file, from DOS (or a DOS shell), go to your root C: drive. Then at the C:\ prompt, type EDIT CONFIG.SYS. Look for an entry that starts off like this: FILES =. Note the number that comes after the equal sign. We recommend you have 100 files, so the line should read FILES = 100
- Note: if you are running IPM on a Novell network, we suggest you open (or create) the file NET.CFG (or SHELL.CFG, depending on the version of Novell you are running), and make sure you have a statement in the file that reads: FILE HANDLES = 100
- Make sure there are no conflicting files with the extensions: LCK or NET.
- Go to the directory where IPM was installed. Delete any of these three files if they are present: PDOXUSRS.NET, PDOXUSRS.LCK, and PARADOX.LCK. After deleting these files, attempt to run IPM again.

If IPM still won't load, you will need to search for, and delete these three files (PDOXUSRS.NET, PDOXUSRS.LCK, PARADOX.LCK) if they exist anywhere on your path, and, if you are on a network, if they exist anywhere on a mapped or search drive.

6. Main Menu

When you click on the IPM icon on your screen, you'll see this Main Menu:



Under the IPM logo are 8 options. Click once on any of them and you'll enter the particular module you selected. How many of these options you use, and in what detail, is determined by the level of access authorized by the System Administrator. First we'll look briefly at each option, and then devote a subsequent chapter to detailed study.

Main Inventory is the option for most users most of the time. It is the location of all IPM records, and their supplementary data screens. Here you add new assets and components to your database, edit existing records, note which items have been surplussed, and delete properly discarded items.

Lookup Tables are the supporting databases that serve as building blocks when you are constructing a property record. **Entering Lookup Tables data should be your first activity**, since you will want to make them available to users as they sign on to IPM.

Reports are available in two forms: pre-defined reports, and custom reports. All reports may be sent to the screen for previewing before they are printed, sent directly to the printer, and/or exported to another file format.

Audit Functions provides access to procedures relating to use of the bar code reader, and to reports on various aspects of an audit.

Utilities is chosen when exporting data, rebuilding indexes and tables, and in backing up or restoring data, or invoking a custom data processing routine.

System Setup allows the System Administrator to customize field names throughout the system, set the numbering sequence for bar codes generated when entering a new asset, and execute system upgrades.

System Security allows the System Administrator to enter new users and their passwords, and specify degrees of access to all areas of IPM.

Exit, of course, takes you out of IPM.

7. Lookup Tables

7.1. Lookup Table Overview

Whether or not your IPM application includes the use of Lookup Tables, you will want to read this chapter carefully for its descriptions of the fields on the Asset Info screen, and the procedure for deleting employees from the data base.

Lookup Tables are smaller data bases used in IPM to build Asset Info records. Lookup Tables eliminate duplicate entries and ensure consistency in data entry throughout the system. If anything is changed in a Lookup Table, all the records and other Lookup Tables that use it are automatically changed. Several Lookup Tables have an additional value: they speed up data entry by completing more than one field.

If the System Administrator elects to use them, decisions must be made about codes for Departments, Organizations (if used), Property Administrators, and Employees, as well as the Tables/fields where data entry is required before IPM will accept a record. Required fields should contain just enough basic information to identify and locate an asset. Once these operating procedures are set, **the first task is to populate the Lookup Tables**. As employees or assets enter or leave, enter the changes into the Lookup Tables. Thanks to a feature called Autoflow, changes made to a Lookup Table are automatically incorporated into all records where the changed value occurs.

Organizational needs may not include all of the Lookup Tables. Unused Tables-- Account Code, for instance, or Organization, or FSC (for non-government users)-- may be re-named and used for unique requirements.

7.2. Lookup Table Main Screen

When you select **Lookup Tables** from the Main Menu Screen, the following screen appears:

The screenshot displays the 'IPM Lookup Tables' application window. The title bar reads 'IPM Lookup Tables'. Below the title bar is a menu bar with 'File', 'Record', 'Goto', and 'Help'. A toolbar follows with icons for 'Save', 'Cancel', 'Insert', 'Delete', 'Search', and navigation controls. The left sidebar lists various lookup tables, each preceded by a radio button. 'Employee' is selected and bolded. The main content area contains a form with fields for 'User ID', 'First', 'Last', 'Dept', 'Organization', 'Room #', 'Building', 'Phone', 'Extension', 'Fax', 'Parking', 'Email', and 'Photo'. A 'Photo' button is located at the bottom right of the form. The status bar at the bottom shows 'Employee: Rec # 2 of 3753' and a progress indicator at '0%'.

Lookup Tables are listed along the left side of the screen. The ones a user may access (as authorized by the System Administrator; see section 12.2.4) appear in Bold type. The radio button by each table name will "light" to show which one the user is currently viewing.

7.3. Lookup Table Buttons

At the top of the Lookup Table screen is a row of buttons that allow you to make changes to the various lookup table data elements.



The first two buttons will allow to save any changes you make to a record or to cancel those changes before they are saved.



The next buttons allow you to Insert new table entries and Delete unwanted entries



The **search** button provides a quick way to search (and sort) the lookup table:

The next 4 buttons provide quick access to the data in each table:



These are usually referred to as VCR buttons because they resemble the control buttons on a VCR. The first button takes you to the **first record** in the table. The second button goes to the **previous record** to the one displayed on the screen. The third button to the **next record** after the one displayed on the screen, and the last button takes you to the **last record** in the table.



The second to the last button allows you choose Table View or form view. Table view shows multiple records at one time. Form View shows one record at a time.

The last button allows you to exit from the lookup tables.

7.4. Employee Lookup Table

The **Employees** table is used to access, add, or delete the names of property custodians, that is, those employees who have accountable property in their possession. This table underlines two of the major advantages of IPM: by selecting the employee information from a Lookup Table, more than 10 fields on the Main Inventory screen are completed automatically; and the information is consistent for all assets assigned to an employee.

As you can see from this description of the **Employees** table, several other tables--Department, Organization, Room #, Building--are related to it. Some of the other tables also are inter-related. We therefore suggest you enter Lookup Table data in the following order:

- | | | |
|-----------------------------|------------------|--------------------|
| 1. Departments | 2. Room Numbers | 3. Organizations |
| 4. Employees | 5. Manufacturers | 6. Asset Classes |
| 7. Asset Types | 8. Account Codes | 9. Contract Number |
| 10. Property Administrators | | |

7.5. Adding Employees

To add_a new employee, click on the  button.

User ID	<input type="text"/>				
First	<input type="text"/>		Last	<input type="text"/>	
Dept Name	<input type="text"/>	↓	Organization	<input type="text"/>	↓
Room #	<input type="text"/>	↓	Building	<input type="text"/>	
Phone	<input type="text"/>		Extension	<input type="text"/>	
Fax	<input type="text"/>				
Parking	<input type="text"/>				
Email	<input type="text"/>				
Photo	<input type="text"/>				
					<input checked="" type="checkbox"/> Photo


The table provides space to enter considerable identifying information: the User ID is a unique identifying number (or letter) sequence used to identify an employee who has equipment assigned to him/her. IPM will automatically generate a User ID. However, you will probably want to generate a more organization-specific ID number, perhaps one that is related to the Property Administrator and the Department or Organization. Existing office symbols may be easily adapted to this purpose. **Type** in the ID number and the individual's first and last name. **Select** the name of the Department where the employee works--the arrow allows you to search through current entries in the Lookup Table for this field; Organization , a sub-division of the employee's Department (another Lookup Table); and Room # and Building (another Lookup Table). **Type in** the Phone Number; Extension; Fax Number; Parking (space number); (parking) Sticker #. The (Employee) Photo filename, which is optional, may be typed in or selected by clicking on the photo checkbox in the lower right corner.

You may also add new data to Lookup Tables while you're adding a new record to your inventory by adding the data directly to the Main Inventory form.

7.6. Deleting Employees

Deleting employees is as important to an accurate database as adding new ones. When an employee leaves, or no longer has accountable property assigned to him/her, you will want to reassign the property items to another employee or return them to an unassigned status. (When first installed, IPM populates the Employee lookup table with an entry "UNASSIGNED" to hold the unassigned assets.) It's advisable to first print a report of items assigned to a departing employee, to ensure that all property is accounted for; see Reports for this procedure. You may then reassign all the items to another employee, assign the items to several employees, or return them the supply point.

Here's the deletion procedure in more detail. Select Lookup Tables from the Main Menu. To locate the employee name to be deleted, use the Next Record arrow at the top of the screen. If your database has a large number of employees in it, you can

move more quickly through the list by clicking on the  Search icon. With this screen

Search

Search Characters

Search By

Last

Last	First	User ID	Building
	TASMIN		
JOHNSON	JOHNT	999G99	3
JONES	JOE L	100T	HEADQUARTERS
REINSEL	BOB	BOB	
SMITH	JOHN	EMP1006	4-B
SMITH	MIMI	EMP1015	PHONE CLOSET
SWANSON	BURGESS	NCUSER005	BASEMENT
SWANSON	RICH	RICH	
UNASSIGNED	UNASSIGNED	00-00-00	
WASHINGTON	JOAN	1003	HEADQUARTERS

EMPLOYEE.DB

Rec # 1 of 11

OK

you use the Down arrow in the Search By box to search the list of employees by any field in the Lookup Table (ID, first or last name, etc.). If you move from one field to another, the contents of the display change to the value of the subsequent field. Then use the Search Characters box to browse within the field values. For example,

you might click on Last to sort the table by last name, then enter the letter R, or RO, RO, etc. to get to the first Last name that begins with R, RO, etc. to find the name "Ronson".

When you get to the employee's name, click on OK at the lower right corner of the screen, then on the Delete button at the top of the box. (Notice that at the bottom of the box is a small display that shows you the place of the asset in the total number of assets assigned to the employee.) You'll be asked, "Reassign Assets? YES NO". If you select YES, you're asked whether you want to "Mark all assets UNASSIGNED", "ASSIGN all assets to a different employee", or "SELECTIVELY assign assets to various employees".

Reassign Assets

Reassign TASMIN 's Assets

☐ Mark all assets as UNASSIGNED

☐ ASSIGN all assets to a different employee

☒ SELECTIVELY assign assets to various employees

Save

[Select new employee to assign assets. Press down arrow]

Cancel

Bar Code

Description

0 of 0 0% ☒ Safe Mode

The first choice will change each asset record to show UNASSIGNED in the Last Name field. The second choice will give you a list of your employees, from which you will select the one to receive the assets. The SELECTIVELY choice will give you a list of employees and a list of the barcode numbers and a short description of each asset. To reassign an asset, select the employee and click on the Save (diskette) icon and confirm the change. You will automatically move to the next asset, and the display showing the number of assets will be reduced by one. If you do not confirm the reassignment, you can use the right arrow button at the top of the box to move to the next record. You may also remove the Confirm pop-up screens by removing the X in the Safe Mode box at the lower right of the screen. Reassignment of all assets is required before the employee's name is deleted from the Lookup Table.

7.7. Department Lookup Table

Dept	<input type="text"/>
Dept Name	<input type="text"/>

The **Department** table lists major components of your company or agency by the Department code or symbol and the name of each. The Next Record button will move you through the field values. You may also use the Search icon for a list of Departments.

7.8. Asset Type Lookup Table

Asset Type	<input type="text"/>	
Manufacturer	<input type="text"/>	↓
Model #	<input type="text"/>	
Asset Class	<input type="text"/>	↓
Depreciation	<input type="text"/> years	<input checked="" type="checkbox"/> Photo
Photo	<input type="text"/>	

The **Asset Type** Lookup Table lists all the current Asset Types and their related Asset Classes. (Notice the arrow for Asset Class; it allows you to search through the current values for this field.) The Table also shows the depreciation schedule (if any); the model number; and the manufacturer of the asset.

Here is an important point to remember about Asset Types: to provide the maximum specificity for your database, IPM treats each combination of Asset Type, Manufacturer, and Model Number as a separate Lookup Table entry. Thus an IBM monitor model 4100 is differentiated from IBM monitor 4200. In preparing reports on your inventory, each model number would be listed separately, thus providing greater information about assets on hand. Use the arrow buttons to move through the list of Asset Types, or the Search icon to locate a Type more quickly.

7.9. Asset Class Lookup Table

Asset Class	<input type="text"/>
Depreciation	<input type="text"/> years

The Asset Class table lists the current values for this field, and their depreciation schedule. Use the arrow buttons and Search icon to locate a specific Class.

7.10.Manufacturer Lookup Table

Manufacturer	<input type="text" value="16089"/>
Manuf. Code	<input type="text" value="111111"/>

The **Manufacturer** table lists all the manufacturers of items in your inventory, and ensures that the same manufacturer designator is used throughout your property system. Use the arrow buttons and Search icon to locate a specific manufacturer.

7.11.Account Code Lookup Table

Account Code	<input type="text"/>
Description	<input type="text"/>

Users whose property system is tied into the accounting system will find the Account Code Lookup Table useful in sorting assets by the accounting codes under which they were purchased. The table lists the codes and a short description of each. If not used for accounting codes, the table is available for other user needs.

7.12. Room Number Lookup Table

Room #	<input type="text"/>
Building	<input type="text"/>

The Room # table lists all the locations where accountable property is located. It is used to complete a field in the Employees Lookup Table and in the Building Lookup Table.

7.13. Contract Number Lookup Table

Contract #					
Contractor					
Street					
City		State		Zip	
Phone					
Contract Date					
Cost					

Particularly where large purchases are involved, you may wish to enter the Contract #, the Contractor name, address and phone number, the date of the contract, and cost in the Contract # Lookup Table. Entering this information from a Lookup Table allows the user to complete these Asset Info fields automatically for each item purchased under one contract.

7.14. Maintenance Agreement Lookup Table

Maint. Agmt. #	<input type="text"/>	
Maint. Company	<input type="text"/>	
Phone	<input type="text"/>	
Fax	<input type="text"/>	
Maint. Begin	<input type="text"/>	Expiration Date <input type="text"/>
Cost	<input type="text"/>	
Contact 1 <input type="text"/>		
Contact 2 <input type="text"/>		

Like the Contract Lookup Table, the Maintenance Agreement table allows you to complete a number of Main Inventory fields:

Maintenance Agreement #, Maintenance Agreement Company, its phone number and fax number, the beginning and expiration of the agreement, its cost, and up to 2 Contract numbers which are related to the Agreement.

7.15. Property Administrator Lookup Table

A.O.	BOB
Prop. Admin.	BOB REINSEL
Phone	301-654-9100

The term “Property Administrator” refers to the person who is responsible (accountable) for a group of assets, or a group of employees who are using corporate assets. The Property Administrator could be a manager, or a staff member to whom the duty has been delegated. The **Property Administrator** Lookup Table lists all the accountable personnel and their phone numbers. Note that, like the **Employees** Lookup Table, there is also an Administrator code for each entry. You may use the number generated by IPM, but we recommend you develop your own internal system that relates Property Administrator codes to Employee codes. This is particularly advisable in large organizations with a number of regional offices that are using IPM.

7.16. Organization Lookup Table

Organization	<input type="text"/>
--------------	----------------------

The **Organization** Lookup Table lists sub-divisions of Departments, and is also used in completing the **Employees** table.

7.17. Vendor Lookup Table

The information in this table refers to the organization or company from which an asset was purchased. (Note: this may or may not be the manufacturer.)

The Vendor Lookup table looks like this:

Vendor	<input type="text"/>
Contact	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>

7.18.Condition Code Lookup Table

The Condition code is a designator (numeric, alpha, or alpha-numeric) used to indicate the usefulness of an asset prior to assigning it to a custodian or declaring it as surplus. Condition codes may be established within an organization or by industry/government standards.

The Condition Code lookup table looks like this:

Condition Code	
Description	

7.19. FSC Code Lookup Table

The Federal Supply Classification (FSC) is a numeric code used by the Federal government to identify asset classes and types.

The FSC Code lookup table looks like this:

FSC Code	<input type="text"/>
FSC Description	<input type="text"/>

8. Working with Inventory

8.1. Main Inventory Overview

This is the area of IPM where you'll spend the most time, so you'll want to become thoroughly familiar with the information in this chapter. A reminder: **If you are using Lookup Tables, be sure you first complete them before starting to enter data.**

You may also wish to consider which fields in your database should be required, that is, where an entry is mandatory for IPM to accept a record. Initially, only the bar code is required. What additional fields are considered to provide the minimum information needed to identify and track an asset? Your organization's existing policies, the System Administrator's experience with property management, or the desire to revise existing practices can serve as guides.

8.2. Folders On Main Inventory Screen










(This needs to be reworked. RMR)

On the screen itself , you'll see the main "folder", Asset Info; behind it are other folders that contain information related to that asset: Components; Service; Comments; Depreciation; Edit History; and Additional Help. We'll discuss these below.

Folders On the Main Inventory Screen:

8.3. Main Inventory

When you click on Main Inventory, you are presented with the first record in your property inventory. To help you visualize how IPM stores information, the screen is designed to look like a series of file folders, with a main folder (Asset Info) and “tabs” indicating other folders with supporting information behind the Asset Info screen.

 Assets  Parts  Service  Notes  Depr.  History  More	<u>Bar Code</u> <input type="text"/>		
	Admin. Code <input type="text"/>		
	<u>Location Information</u>		
	Last <input type="text"/>	First <input type="text"/>	User ID <input type="text"/>
	Room # <input type="text"/>	Building <input type="text"/>	Phone <input type="text"/>
	Dept <input type="text"/>	Dept Name <input type="text"/>	
	Organization <input type="text"/>	Extension <input type="text"/>	
	<u>Asset Description</u>		
	Asset Type <input type="text"/>	Asset Class <input type="text"/>	
	Manufacturer <input type="text"/>	Model # <input type="text"/>	
Vendor <input type="text"/>	FSC Code <input type="text"/>		
P.O. # <input type="text"/>	Serial # <input type="text"/>		
Description <input type="text"/>	Cost <input type="text"/>		
Contract # <input type="text"/>	Warranty Exp. <input type="text"/>		
Account Code <input type="text"/>	Condition Code <input type="text"/>		
Date Received <input type="text"/>	Last Audited <input type="text"/>		
Replacement Date <input type="text"/>	Next Scheduled Maint <input type="text"/>		

8.4. Components

When you click on the Components tab, you'll get the following information and options:

The screenshot displays a software interface for managing asset components. It is divided into three main sections:

- Left Panel:** Contains summary information for the asset.
 - Bar Code:** 0000192
 - Description:** 140:PORTABLES,HAND RADIO/COMM EQUIP MOTOROLA SABER III
 - Employee:** (Field is empty)
 - Administrator:** TERRY ALVERSON
- Middle Panel:** Displays details for a selected component.
 - Component 0 of 0**
 - Asset Type:** A dropdown menu with a list of options.
 - Component Code:** A text input field.
 - Cost:** A text input field.
 - Asset Type:** A dropdown menu.
 - Asset Class:** A dropdown menu.
 - Manufacturer:** A dropdown menu.
 - Model #:** A text input field.
 - Vendor:** A dropdown menu.
 - Serial #:** A text input field.
 - Account Code:** A dropdown menu.
 - P.O. #:** A text input field.
 - Contract #:** A dropdown menu.
 - Date Received:** A date input field.
 - Date Installed:** A date input field.
- Bottom Panel:** Contains navigation and action buttons.
 - Four small navigation buttons (back, forward, etc.).
 - Reassign** button.
 - Depreciation** button.

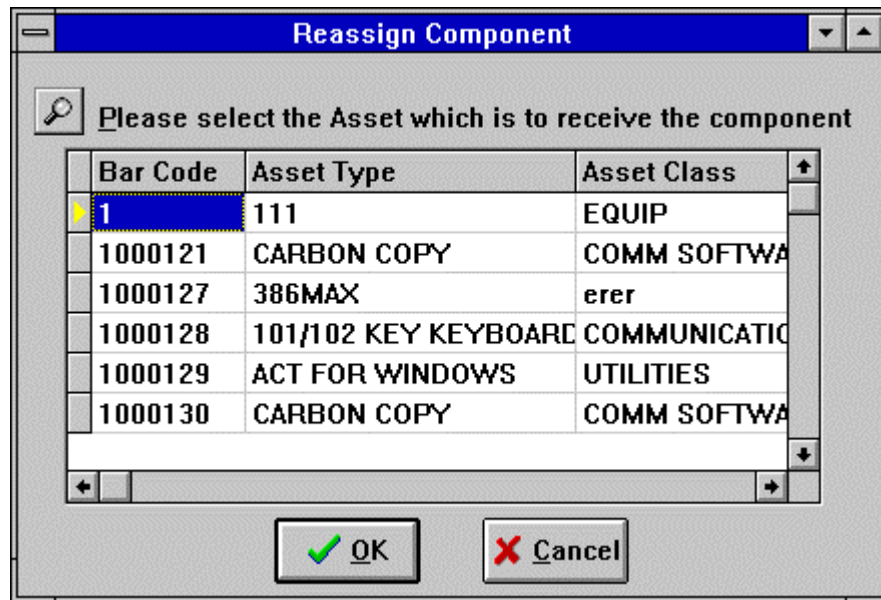
In the left window is a summary of information about the asset to which this component is attached (bar code, Property Administrator, User ID, etc.); notice that below it are VCR buttons allowing you to move to other assets without returning to the Asset Info screen. In the middle window, Asset Type, is a list of the components attached to the main Asset. Under the Asset Type box are two buttons that enable you to reassign the component to another asset, and to display the Depreciation schedule.

Reassigning a Component

Component Depreciation operates the same as Asset Depreciation, which is described in detail in the Depreciation section.

8.5. Reassigning a Component


To reassign a component to another asset, click on the Reassign button. A pop-up window





will then ask you to select the Asset which is to receive the component. You may use the slider arrow at the right of the window, or, to locate the Asset more quickly, you may use the Search icon (the magnifying glass). Clicking on that will bring you the Locate Field Value window (see the discussion of the Search function). When you have located the Asset, click on the OK button at the bottom of the box; the component will be immediately assigned to the "new" Asset.


8.6. Service


Choosing this option leads you to a further set of folders:



Assets



Parts


Service


Notes


Depr.


History


More

Bar Code

Description

Employee:

Administrator

Service Log

Maint Schedule

Maint Agreement

Action Date

Covered by a Maintenance Agreement ? ☐

Activities Performed

Down Time

Cost

Performed By

Supplies Used

PartNo	Quantity	Description

Insert

Save

Delete

Cancel

☒ Sched

Notice that the Asset Info summary remains at the left of the screen. The first tab, Service Log, is displayed; behind it is a tab for the Maintenance Schedule, and one for the Maintenance Agreement.

8.7. Service Log

Service Log

Maint Schedule

Maint Agreement

Action Date

Covered by a Maintenance Agreement ?

☒

Activities Performed

Down Time

Cost

Performed By

Supplies Used

PartNo	Quantity	Description

Insert

Save

Delete

Cancel

☒

Sched

The Service Log screen has boxes for Action Date, with a Down arrow; a Covered by Maintenance Agreement box, where an X indicates “yes”; and Activities Performed.

The Action Date box will display the first date when service was performed on this asset. The Down arrow is an On/Off switch: click on it and you’ll get a pop-up screen with a list of Action Dates and Service Descriptions; use the slider arrow or the up/down arrow keys to move through the list.

Activities Performed will tell you, for each service date, the Down Time, Cost of service, who the service was Performed By, and the Supplies Used (Part No., Quantity, and Description). Use the VCR buttons at the lower left to move through the Activities Performed. Under the window are buttons for Add (to type in new Activities), Save (to confirm the addition), Delete and Cancel.

To the lower right is a box--Sched--with a green check. If you click on this you’ll see a pop-up window titled “Select Scheduled Maintenance Completed by this Service Call”, and a table with columns headed Check, Sched. Maint., Next Maint. Due, and Activities. Double clicking the Check box will add/delete an X for that line. Use the Completed and Cancel boxes to show the maintenance has been performed, or to cancel that scheduled maintenance (you will then be asked to confirm the cancellation). Clicking on either box will remove this window.

8.8. Maintenance Schedule

The screenshot shows a software window titled 'Maintenance Schedule'. It features three tabs at the top: 'Service Log', 'Maint Schedule' (which is the active tab), and 'Maint Agreement'. Below the tabs, there are two dropdown menus: 'Next Maintenance Due' and 'Frequency'. Below these is a large, empty text area labeled 'Activities'. At the bottom of the window, there are five buttons: 'Insert', 'Save', 'Delete', 'Cancel', and 'Skip' (which has a green person icon next to it). Below the buttons are four navigation arrows: a double left arrow, a single left arrow, a single right arrow, and a double right arrow.

This tab displays 3 boxes: Next Maint. Due (with an on/off arrow), Frequency (with an on/off arrow), and Activities. These boxes show the value for the first maintenance date, how often the maintenance is to be performed, and the nature of the maintenance. Click on the arrow by Next Maint.Due, and you'll be given a pop-up window with a list of dates when maintenance is scheduled, and a Selection column showing the frequency with which it is performed. If you click on any date you'll be given a display of activities scheduled for it. The buttons at the bottom of the table allow you to Add, Save, Delete, Cancel, or Skip scheduled maintenance.

The Frequency box shows how often the Next Maint. Due is performed. Click on the on/off arrow and you'll see a pop-up box of possible frequencies: Daily, Weekly, Monthly, Quarterly, Semi-Annually, Annually, Biannually, and Every. A few words of explanation will help you understand "Every". Note the on/off arrow and box by the Every option, and the yellow bubble help box that describes it (Unit of Frequency). If you click on the Every arrow, you'll be asked to "Please select the frequency unit". Since by choosing Every you indicate that the frequency is none of the ones listed, you'll first have to Add this special or unique frequency (hourly, 1000 miles, 18 months, or whatever is required).

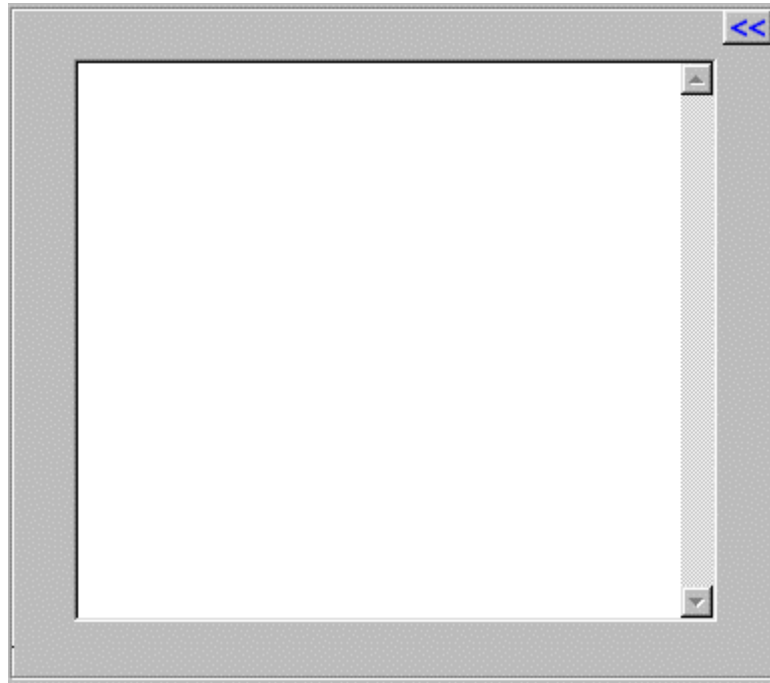
8.9. Maintenance Agreement

Service Log	Maint Schedule	Maint Agreement
Maint. Agmt. #	<input type="text"/>	
Maint. Company		
Contact 1		
Contact 2		
Phone		
Fax		
Expiration Date		
Cost		
Maint. Begin		
<div>Remove</div>		

For each Maintenance Agreement related to the asset, this screen gives you the Maintenance Agreement #, the Company providing the maintenance, 2 contacts there, the phone and fax numbers, the expiration date, the cost of the agreement, and when maintenance should begin. The first agreement entered is shown on the screen; if you click on the on/off arrow you'll get a pop-up window with a list of all the agreements for this asset. Use the slider or up/down arrow keys to move through the list, and click on any agreement number to display the information for it.

8.10.Comments

This option is a blank screen where you may enter any alphanumeric combinations, text, notes, etc. to enhance the viewer's knowledge of the asset.



8.11.Depreciation

Depreciation Schedule <<

Year Straight ☐ Monthly

Year	Current Value	Amount Depreciated
1995	\$3,060.00	\$340.00
1996	\$2,720.00	\$680.00
1997	\$2,380.00	\$1,020.00
1998	\$2,040.00	\$1,360.00
1999	\$1,700.00	\$1,700.00
2000	\$1,360.00	\$2,040.00
2001	\$1,020.00	\$2,380.00
2002	\$680.00	\$2,720.00

☒ Yearly ☐ Monthly

This option shows the Depreciation Schedule. A pop-up window shows the number of years of Straight line depreciation for the asset, the Current Value, and the Amount of Depreciation. You may also select a monthly rate of depreciation for those years: first click on the monthly box; this puts an X in it and changes the buttons at the bottom of the window (Yearly becomes blank, monthly becomes solid). You may use the mouse to toggle back and forth between monthly and yearly depreciation computations. You will quickly realize that only this minimum data manipulation is possible here. Why? Remember that the depreciation schedule is set for each Asset Type in the Lookup Table; any change would have to be made there.

8.12. Edit History

The screenshot shows a window titled "Edit History" with a table containing the following columns: BarCode, EditDate, EditTime, and ControlNumbe. The table is currently empty. A scrollbar is visible on the right side of the table area, indicating that there may be more data to view. The window also features a back button in the top right corner and navigation arrows at the bottom left and right.

This **view-only option** shows when and by whom changes to the asset record were made. If the asset was reassigned to a new user, that name is shown (use the slider bar at the bottom of the box to move the display to the right). To ensure a clear audit trail, no changes can be made to this screen. This option will probably have minimum use.

8.13. Additional Info Screen

NOTE: You may add a second screen to each Asset Info record for information of your choosing by enabling and naming currently unused Alpha fields. See Chapter 9, System Setup.

8.14. Editing Records

There are times--for example, when reassigning an asset to another employee/property administrator, when an item becomes surplus, when an item is deleted, etc.--when you'll want to change the property record to show the change of status. So you locate the record to be changed (see Search) and click on the Edit icon (the button with a pencil). Note: if you have placed a check in the AutoEdit menu option (located from the menu bar: GoTo | Options | Preferences), you do not have to click on the Edit icon. Simply make the desired changes in any field. When you click on Edit, notice that the Save and Cancel speed buttons are now enabled. Make your changes, remembering that fields with an arrow at the left have Lookup Tables that may be used to change those fields. Clicking on the arrow calls up the Lookup Table. Use the slider button and up/down arrows to move through the Table. Use the mouse to highlight the value you wish to enter into the record, and click on it to transfer the value to the Asset Info screen.

You may also access the Edit mode via the Edit option on the Menu Bar. First locate the record to be changed and click on Edit, then select Edit Record from the pop-up options.

8.15. Adding Assets and Components

You may add a record for a new asset by selecting Main Inventory from the Main Menu screen, and clicking on the Insert (+) speed button. IPM then presents you with a nearly blank screen--nearly, because the system has generated a bar code number which you may want to replace (using the Backspace arrow on your keyboard) with your own bar code. NOTE: you may establish your own numerical sequence for automatically generated bar code numbers through the System Setup option of the Main Menu screen. IPM does not permit duplicate bar code numbers.

The system has also the current date in the Date Received field. This date can be overwritten when you are entering an asset on a date other than when it was received. Complete the record, using Lookup Tables where available if desired, and typing in data for the remaining fields. A **blue** field label will indicate any fields that have been designated required. These fields must be completed for IPM to accept the record. You'll notice that the Save and Cancel speed buttons are now enabled. When you're finished data entry, you may add the new record to your inventory (Save) or terminate the entry (Cancel).

You may also access the Add mode via the Edit option on the Menu Bar. Click on Edit, then on Insert Record from the pop-up options. Finally, if you are in IPM, that is, if you are viewing one of your Asset Info screens, you may press the Insert key on your keyboard and get a blank screen.

To add a component, either to a new asset or an existing one, click on the Component tab and then on the Insert (+) button. IPM automatically generates a Component number; you may wish to use this, or develop your own numbering system. You would then backspace over the generated number and type in yours. Enter the available information and click on the Save button. The value of the component is automatically added to the Total Asset Value box at the bottom of the Asset Info screen.

8.16. Deleting Assets and Components

You may delete an asset or component by selecting Main Inventory from the Main Menu screen, locating the record, calling up the asset or component screen, and then clicking on the Delete (-) speed button. A pop-up window will ask you to Confirm the deletion, or cancel it.

8.17. Duplicating a Record

There may be times when you'll want to **duplicate a record**. This function is particularly useful when you're going to enter a large number of the same kind of item--you've just received a shipment of cellular phones for all of your executives, for example. If you already have a record for this make and model (remember, IPM considers each model a separate Asset Type), find that record, click on Edit in the Menu Bar and select the option, Duplicate Current Record. If you have no appropriate existing record, enter one of the phones as a new asset, then click on Edit and select Duplicate Current Record. You'll get a pop-up screen asking how many copies you want (backspace over the "1" in the box and type in the number of additional phones you're entering), and then indicate whether you want to copy All, some (Selected), or None of the component information. If you choose Selected, you'll get a pop-up window titled "Select the components for copy", with a list of the components attached to the original record. Highlight the ones you wish to copy. Then click on OK (or Cancel, if necessary). The system will then generate records using the existing bar code sequence.

8.18. Menu Bar

A screenshot of a menu bar with four items: 'File', 'Edit', 'GoTo', and 'Help'. Each item has a small underline character to its left: a vertical line for 'File', a horizontal line for 'Edit', a diagonal line for 'GoTo', and a horizontal line for 'Help'.

In the Menu Bar at the top of the screen is a series of options (File, Edit, etc.); under that is a row of speed buttons (Save, Cancel, Add, etc.). These control a variety of functions, so let's look at them in detail. First, the Menu Bar.

1. If you click on **File**, you'll be given a pop-up table with the following choices:

Save; Print; Print Setup; Normal View; Deleted View; Surplus View; and Exit.

2. Click on **Edit** and you'll see Undo; Cut; Copy; Paste; Clear; Edit Record; Delete Record; Insert Record; Duplicate Current Record; Search. Some are standard Windows options; "Clear" clears the field where the cursor is placed. Others (Edit, Delete, etc.) are alternate paths to IPM functions also reached by Speed buttons in the Menu Bar.

If you click on **Go To**, your choices are First Record; Last Record; Next Record; and Previous Record. The second group--Options; Main Inventory; Lookup Tables; Reports; Audit Functions; Utilities; System Setup; and System Security--allows you to go directly to an area of IPM without first returning to the Main Menu. An arrow to the right of a choice indicates that it has further choices--Preferences, Sort, Filter View, Send to Surplus, and Exact Record Number. The arrow to the right of Preferences gives you still more choices: Auto Edit, Show Hints, Employee Photo, Asset Photo, Override Sort, Override Filter, and Force Advanced Search.

Auto Edit, if checked, allows you to change field entries without going through the Edit selection on the Menu Bar.

Show Hints lets you turn on/off the "bubble" help throughout the system.

Employee Photo and Asset Photo allows you to show a photo of the employee and/or asset on the Asset Info screen

Override Sort, Override Filter, and Force Advanced Search are related functions. If you have set a sort and later decide on a data request that involves multiple filters, a pop-up box will inform you that the search may take a long time, and ask you confirm your request ("OK") or terminate it ("Cancel"). If you have checked Override Sort, this pop-up box will not appear. If you have set filters on the database and later request a sorted output, the same pop-up box will appear unless you have checked Override Filter. By checking Force Advanced Search you will initiate these multiple-condition requests, regardless of the time they may require because of the size of your data base, the amount of current traffic, the location of the data, etc.

Filter Setup allows you to filter the data base on any field name, that is, show only the records that contain a specific piece of data. You may filter by cost or dates by using

the symbols for equal to, greater than, etc., and beginning/end values to set a range of values.

The Send to Surplus option allows you to transfer an asset from the active inventory to surplus status.

The Exact Record Number option will give you a count of the number of records in your database.

The choices under the **Help** option are Contents; Topic Search; How to Use Help; and About IPM. These are similar to standard Windows screens, and carry their own instructions for use.

8.19. Speed Bar



Displayed above is the Speed Bar that is available on all Main Inventory screens. When in the Main Inventory screen, simply click on one of these buttons to activate it. When you pass over a button, bubble help will appear. (Note: if the button is disabled, no bubble help will appear.)

The first five buttons on the left allow you to change information in your database:



These buttons are: Save; Cancel; Add; Delete; and Edit. The first two are disabled until you are actually adding or editing a record; also, there is no bubble help for disabled buttons.

The next two buttons, Search and Print, allow you to move through or manipulate data base, and print the screen:



The next group of buttons is sometimes called “VCR buttons”.



The first button on the left takes you to the first record in your database; the second button will take you to the immediately preceding record when you are already in the data base. The 3rd button will take you to the next record after the one currently on your screen; and the last button will take you to the last record in your data base.

Finally, the last button on the right, the Exit button allows you to exit IPM.

